

Job Title:

Client Relationship Manager

Job Description:

Palisade Asset Management, LLC a Registered Investment Advisory firm is seeking qualified candidates for filling the role of Client Relationship Manager. The position is responsible for managing and servicing the overall investment, planning and education needs for existing and new clients.

Responsibilities Include (but not limited to):

- Lead client relationship manager for existing and new clients
- Provide pro-active client support and guidance on all wealth management matters
- Work closely with portfolio managers to provide customized client investment guidance
- Proactively develop business leads from existing and prospective clients
- Respond to inquiries and present as a team member to prospective clients
- Assist with marketing and branding responsibilities as appropriate

Required Qualifications:

- Bachelor's Degree
- 10+ years of wealth management experience in a client facing role
- Strong experience with complex wealth management functions for high net worth relationships, including investment management, retirement and financial planning, estate and tax planning, and trust administration
- In-depth experience with creating appropriate investment strategies to match each client's specific financial needs
- Exceptional commitment to provide the highest level of quality to servicing clients, improving work processes, and the team environment
- Strong interpersonal verbal, listening, and written communication skills
- Strong organizational and time-management skills
- Comfort to work entrepreneurially with the ability to excel in both a small team work environment and working independently
- Software proficiency with Microsoft products and financial planning
- CFA, CFP, CPA, or JD preferred

Company Background:

Palisade Asset Management, LLC, is a Registered Investment Advisory firm founded in 2002 to service the investment, planning, and other comprehensive financial needs of high net worth individuals, families, non-profit entities, and corporations. Palisade has one office, located at the below address in Minneapolis.

How to Apply:

Please send cover letter and resume via email only to:

info@palisadeam.com

No phone calls please